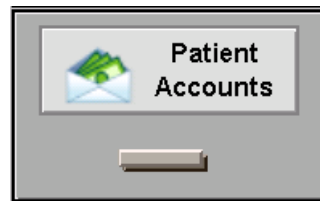


Auto Post Payments Guide

Requirements:

1. Your practice must be billing insurance claims through ICANotes using an integrated clearinghouse
2. Claims sent to the clearinghouse must be in the 837 file format

When you begin sending claims to the clearinghouse electronically, the clearinghouse will begin receiving electronic remittances (EOB's) from the insurance payers. ICANotes will download these remittances into Patient Accounts automatically for you to post at your convenience.



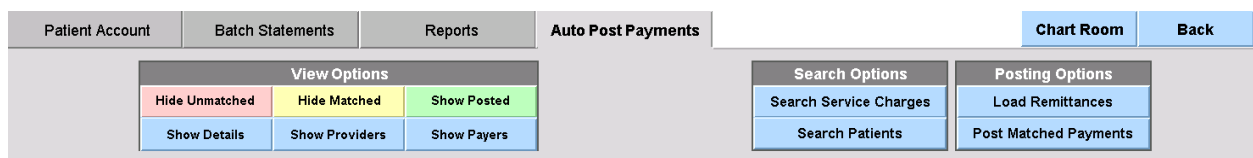
To access the auto post feature, enter the Patient Accounts filing cabinet from the Chart Room, or access Patient Accounts from one of the many Patient Accounts buttons throughout the program.

You will see four tabs across the top of the Patient Accounts window.



Select the "Auto Post Payments" tab.

Here is what you will see at the top of the Auto Post Payments tab:



If this is your first time auto-posting payments, use the **Load Remittances** button under the Posting Options section on the right. This button will load any remittances that have been received by your clearinghouse from the insurance payers. If you have been using the auto post feature, you will use this button any time you wish to load new remittances for posting.

Note: When you have new remittances waiting to be loaded, this button will light up bright yellow as a visual reminder.

When your data loads it will look similar to this:

Patient Account	Batch Statements	Reports	Auto Post Payments	Chart Room	Back							
<div><div>View Options</div><div><div>Show Unmatched</div><div>Hide Matched</div><div>Show Posted</div><div>Show Details</div><div>Show Providers</div><div>Hide Payers</div></div></div>				<div><div>Search Options</div><div><div>Search Service Charges</div><div>Search Patients</div></div></div>	<div><div>Posting Options</div><div><div>Load Remittances</div><div>Post Matched Payments</div></div></div>							
Imported Remittances				ICANotes Service Charges								
PGBA, LLC. CAMDEN SC Check Date: 10/2/2013 Check No.: 0060003626SA4 Total Paid: \$118.97												
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/17/2013 99213	\$100.00	\$64.31	\$35.69	\$64.31	9/17/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/24/2013 99213	\$100.00	\$64.31	\$45.34	\$54.66	9/24/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
PGBA, LLC. CAMDEN SC Check Date: 10/2/2013 Check No.: 0060027139SRT Total Paid: \$90.27												
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/16/2013 99214	\$125.00	\$56.32	\$79.94	\$45.06	9/16/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00
<input checked="" type="radio"/>	X X Primary	9/16/2013 90834	\$175.00	\$56.51	\$129.79	\$45.21	9/16/2013	90834 Psychotherapy 45 min.	\$175.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/16/2013 99213	\$100.00	\$56.51	\$100.00	\$0.00	9/16/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
BLUE CROSS BLUE SHIELD OF ALABAMA BIRMINGHAM AL Check Date: 10/10/2013 Check No.: 0033648955 Total Paid: \$292.59												
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	10/1/2013 99213	\$100.00	\$100.00	\$31.37	\$31.38	10/1/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/19/2013 90847 U6	\$175.00	\$175.00	\$121.50	\$53.50	9/19/2013	90847 FAM PSYTX W/PATIENT	\$175.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/16/2013 99213	\$100.00	\$100.00	\$62.75	\$0.00	9/16/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	9/26/2013 90792	\$250.00	\$250.00	\$82.15	\$82.15	9/26/2013	90792 Psychiatric Diagnostic	\$250.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="radio"/>	X X Primary	10/1/2013 99214	\$125.00	\$125.00	\$19.00	\$76.00	10/1/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00
<input checked="" type="radio"/>	X X Secondary	10/1/2013 99214	\$125.00	\$125.00	\$106.00	\$19.00	10/1/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00

In the example above, all the remittances imported are yellow, meaning the program has matched the payments to the service charge the claims were billed out for. This is the ideal scenario. There are no unmatched remittances so these matches can be recorded quickly by pressing the **Post Matched Payments** button, after which they will turn green indicating that they have been posted.

Take a look at the View Options buttons.

View Options		
Show Unmatched	Show Matched	Hide Posted
Show Details	Show Providers	Hide Payers

After matched claims have been posted, you can use your View Options buttons to filter out or show more details about each remittance or charge.

Show Posted

allows you to see all posted remittances.

Hide Posted

will remove all posted remittances from the list so you can focus your attention on any unmatched remittances or match remittances that still need posting.

View Options		
Show Unmatched	Show Matched	Hide Posted
Show Details	Show Providers	Hide Payers

Show Matched will reveal all remittances that have been matched up to a service charge in Patient Accounts and need to be posted.

Hide Matched will hide remittances that have been matched up to a service charge but remain unposted.

Show Unmatched will reveal all unmatched remittances.

Hide Unmatched will hide all unmatched remittances.

Show Details and **Hide Details** will expand/hide details under each remittance. Here is an example of a remittance showing details:

	CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
X X	Primary 9/26/2013 90792	\$250.00	\$250.00	\$82.15	\$82.15	9/26/2013	90792 Psychiatric Diagnostic	\$250.00	\$82.15	\$0.00	\$82.15
	Co-payment Amount			PR 3	\$0.00	9/26/2013	Pmt: AP 0033648955 90792		\$82.15	\$0.00	\$82.15
	Previously paid. Payment for this claim/service may have been provided in a previous			OA B13	\$0.00						
	Charge exceeds fee schedule/maximum allowable or contracted/legislated fee			CO 45	\$82.15						

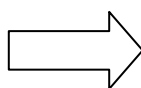
Hide details will consolidate the remittance to just show the first bright green line of information.

Show Providers will separate remittances per provider. You will also see a Hide Providers option when the providers are shown.

Show Payers and **Hide Payers** will either separate remittances by insurance payer or hide the payers to show all remittances based on your View Options selections.

So now that we know how to load remittances and post matched remittances, as well as view the remittance report based on the information you would like to see, what do we do with any unmatched remittances?

Let's look at the Search Options buttons



Make sure your viewing options are configured so you are only looking at the unmatched remittances in red.


Patient Account		Batch Statements		Reports		Auto Post Payments		Chart Room		Back					
<div>View Options</div> <div><div>Hide Unmatched</div><div>Show Matched</div><div>Show Posted</div></div> <div><div>Hide Details</div><div>Show Providers</div><div>Show Payers</div></div>								<div>Search Options</div> <div><div>Search Service Charges</div><div>Search Patients</div></div>		<div>Posting Options</div> <div><div>Load Remittances</div><div>Post Matched Payments</div></div>					
Imported Remittances								ICANotes Service Charges							
				Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid	
		1	9/17/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									9/17/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
		1	9/20/2013	90837	AH		\$150.00	\$106.18	\$20.00	\$43.82	\$86.18				
									9/20/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
				Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid	
		1	7/28/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									7/28/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
		1	8/4/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									8/4/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
		1	8/11/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									8/11/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
		1	8/18/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									8/18/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	
				Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid	
		1	9/15/2013	90837	AH		\$150.00	\$106.18		\$150.00	\$0.00				
									9/15/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00	


First, use the **Search Service Charges** button. The program will begin to search through all service charges for each patient a remittance came in for. It will try to match up the remittance for each patient who has a matching first name, last name, date of service and CPT code. If a match is found, you will see something similar to this:

Imported Remittance										ICANotes Service Charge							
						Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid	
		1	9/17/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00							
												9/17/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00

Under the **ICANotes Service Charges** column you can see the program has found a match. When a match is found and you are confident that it matches the remittance, use the icon to link the service charge to the remittance.

X X	Primary 9/25/2013	90847	\$175.00	\$175.00	\$0.00		9/25/2013	90847 FAM PSYTX W/PATIENT	\$175.00	\$0.00	\$0.00	\$0.00

The  icon allows you to open up the service charge detail screen so you can review the information that will post into the patient's account.

If the program cannot find any matches using the **Search Service Charges** button, your last option is to click on **Search Patients** to see the  icon next to each patient name. This will allow you to quickly view each patient's account activity page to determine why no service charge is found. In this case, it is very likely that the service charge was deleted or never recorded, so you will need to manually add the service charge into the patient account tab and then try to **Search Service Charges** again to match them.

With the tips and explanations in this guide, you will be able to successfully post remittances received automatically from your integrated clearinghouse.